Red Lantern ANALYTICA

EUROPE WITHOUT RUSSIAN ENERGY

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Executive Summary

This report looks at how Europe is trying to deal with Russian energy in 2026. It goes beyond the broader European response to the Russian question, evaluating the gap between what has changed on paper and what has changed in practice.

It shows how Europe's decision to stop using Russian energy has evolved over the course of the Ukraine war. At first, it happened naturally. Now, it seems like a deliberate and organized move. A big change happened in 2026, when the European Union introduced rules that every state had to follow. Before that, Europeans were largely trying to do things on their own. Now that the EU has set deadlines, European states have to follow these rules and cannot rely on political will alone.

The report then explores a development that complicates the official European narrative: the unexpected rise in Russian imports just as the new rules came into effect in 2026. This finding raises an important question about how large-scale policies interact with market behaviors in the short term, and what this might reveal about the pace of change versus the pace of law.

Beyond this EU-wide picture, the report also looks at how states differ in their progress, showing that the transition away from Russian energy has not moved at the same speed everywhere, and why some countries still remain exposed. It also considers the wider energy landscape that is reshaping the supply mix, including the role of renewables and alternative sources for European energy needs.

At the end, the report draws together these threads into a broader conclusion about what this moment really represents: whether it marks a genuine structural shift in Europe's energy relations with Russia, or whether it is a more organized version of a European walk away that has been underway for years.

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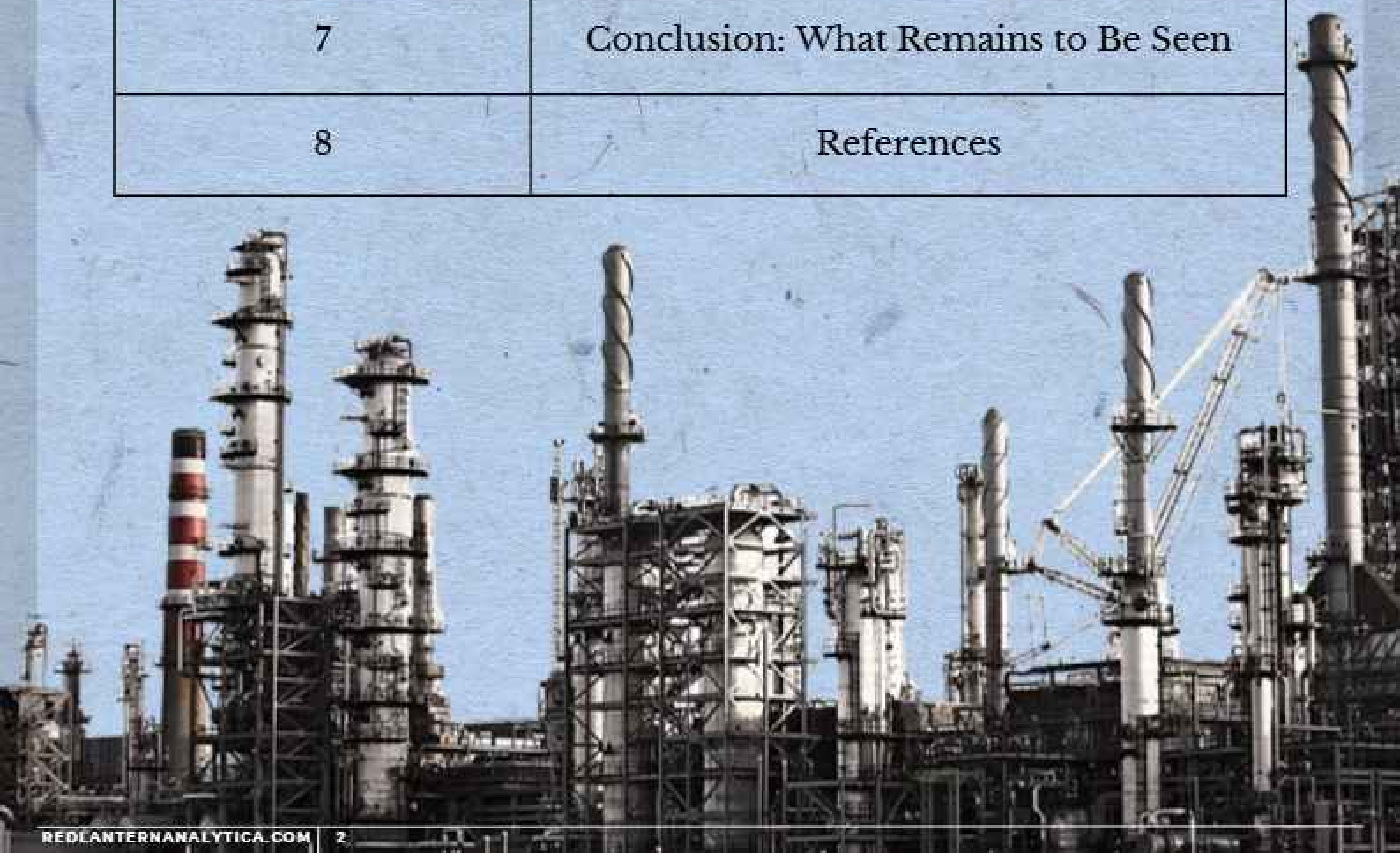
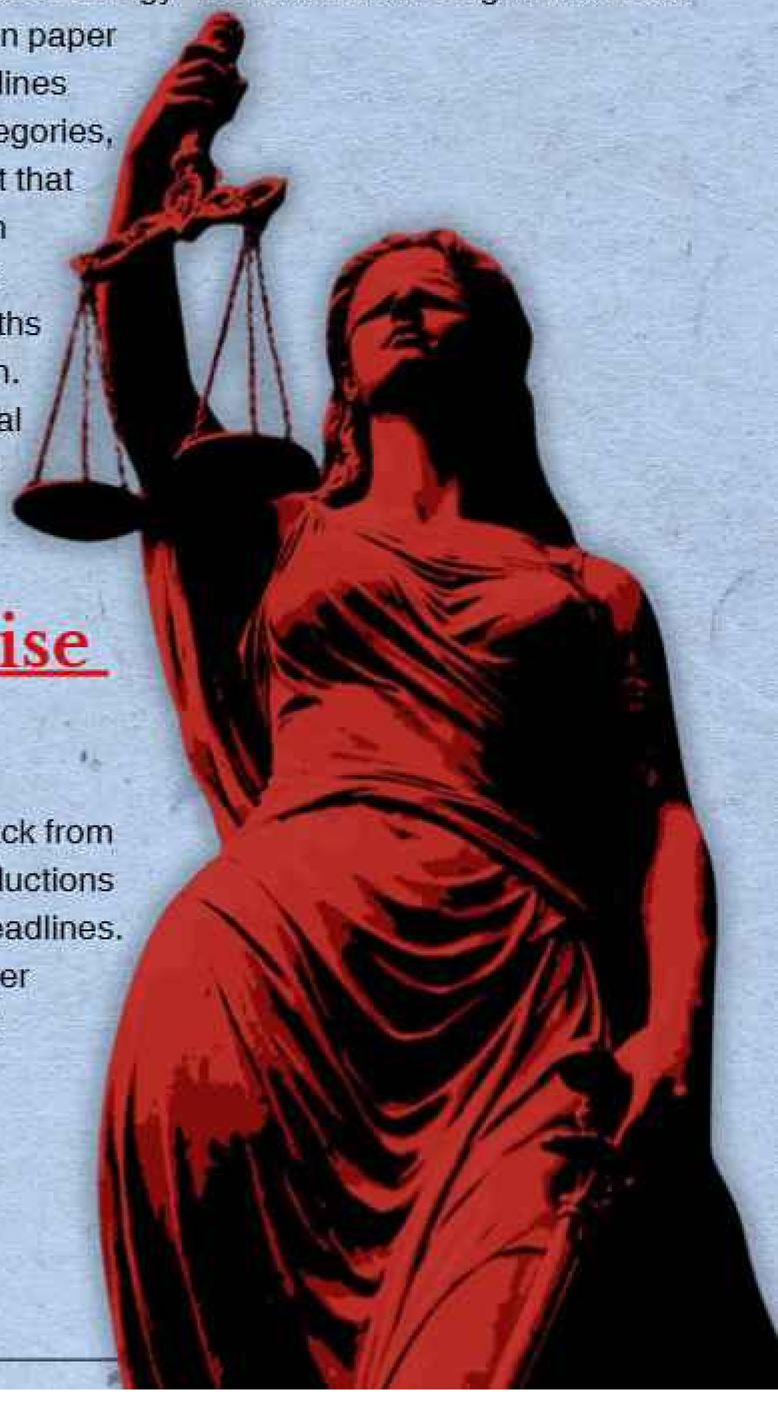


Introduction

Russian energy was never just another item on Europe's import ledger; it was an infrastructure the continent made for itself around for decades. Pipelines, storage contracts, and pricing models, all were created based on the idea that Russian gas, oil and coal would keep flowing cheaply and reliably. By the early 2020s, close to half of Europe's gas imports were Russian along with a significant share of its oil and coal, making it the bloc's single largest external energy partner.

This assumption collapsed with Russia's invasion of Ukraine in 2022. Overnight, energy became a security question for Europe where they faced a stark choice to either keep funding the war through the Russian energy purchase or rebuild the bloc's supply chains under pressure. What followed was years of improvisation. Europe tried to cut Russian volumes and diversify its suppliers.

But for quite some time, "Europe cutting off Russian energy" had been more slogan than fact. Though in 2026, that finally started to change, on paper at least. Europe started to write hard legal deadlines into laws. With actual dates, actual contract categories, and actual enforcement. And yet, there's a twist that says a lot about how messy this whole transition really is and is going to be. Russian gas imports into the Europe actually went up in the first months of this year, right as the phase out was kicking in. Understanding both halves of that story, the legal architecture and the reality which is underneath it, is the key to understanding where Europe's energy relationship with Russia stands today.



From Political Promise to Binding Law

For most of the war in Ukraine, the EU's step back from Russian energy was mostly driven by verbal reductions and substitutions rather than giving firm legal deadlines. This changed in January 2026, when EU member states formally adopted regulations phasing out Russian pipeline gas as well as their liquefied natural gas imports. This rule was part of the long running REPowerEU roadmap launched by EU after the 2022 invasion but it entered into force in February and began applying in mid-March.

The system is set up in a way that spreads things out of using just one stop button. This has been done to stop the shocks on the markets which still depends on Russian volumes. Since March, new deals have been stopped. Older short-term contracts will lose their exemption first. All the LNG deliveries under these deals ended on April 2026. Other Gases from Russian pipelines have also been stopped. On the other hand, Long-term deals, which are handling most of the gases will last longer. LNG and other gases are not allowed after January and September 2027 respectively, from these long-term deals. Under these deals, there is a suspension clause that states to pause everything if there is a problem with the supply. Member countries had to give their plans by March 2026 explaining how they will find the new sources for the gas they are losing.

Ursula von der Leyen, president of European commission, described the moment as the beginning of what she termed "full energy independence from Russia,". She framed the policy as both a matter of security and of economic consequence. She also said since funds no longer spent on Russian gas will not contribute to financing the Ukraine war.

Measurable Progress

The situation of European union with gas is really important and significant when looked at the numbers. Since the Ukraine war started, the EU has reduced its dependence on gas, from 45 percent of all the gas it imports to around 12 percent. The situation regarding coal is the most complete. All the Russian coal imports have been stopped and prohibited under the sanctions since the war started. The same can be said about oil imports and its trajectory. Falling from about 27 percent of the EUs import mix during the start of the conflict to approximately 2 percent today. There are only 2 member states, Hungary and Slovakia, which continue to buy Russian oil. What distinguishes 2026 from previous years is that brussels has now converted years of gradual, voluntary reduction into a legal obligation for European states. The remaining volume of European imports that is essentially Russian pipeline gas, roughly about 35 billion cubic meters annually, is now subject to a fixed and supposed irreversible timetable rather than a never-ending show.

A Complication: Imports Rising, Not Falling

The picture gets considerably more complicated when you examine it closely. Data, which is published by the ACER, energy regulator of the European union, indicates that Russian gas imports went up during the early few months of 2026, even though the phase out rule was already in place. When compared to the same time last year from January to May, Pipeline imports went up by 7 percent. Similarly, LNG imports increased by 11 percent. In the weeks immediately following the continent-wide stoppage of Russian imports, LNG was reportedly 17 percent higher than in the same period, in 2025. As per ACER, this increase doesn't show that the policy has failed, but rather a rush among all the importers to secure their deliveries under the current contractbefore those deals can no longer be used.

According to them, this is a pattern of front loading rather than depending on new arrangements. The situation is worsened by the conditions of the global markets. Problems and instability around the Strait of Hormuz have made it difficult to get gases from other places. This has made some buyers reluctant to forgo rest of their remaining Russian volumes too early. The amount of Russian gas that has been agreed to be delivered each year, is between 45 and 55 billion cubic meters. Though this is a substantial reduction from 150 billion cubic meter Russia was supplying before the war. It is still a big amount.

Divergence Among Member States

Progress that is happening across the European Union has been uneven until now, and this unevenness remains a source of internal friction between the European states. Hungary and Slovakia still receive considerable volumes of Russian gas through the TurkStream routes. Both countries are without formal diversification plans. Greece remains a critical intermediary for Russian oil and gas. In total 15 European states continue to buy Russian energy imports, but these positions do not always mean that states are trying to stop the change.

States that are landlocked, geographically constrained, have argued with justifications; that establishing alternative supply infrastructure requires a lot of time, and if done quickly, prices may go up, or there will be supply shortages. The situation regarding oil remains unsettled on the continent. Russian oil occupies something of a legal grey area, it is heavily sanctioned and marginal, yet it's not formally prohibited across the bloc.

What Is Replacing Russian Energy

The figures on replacement supply are the most important part of the European story. In 2025, EU got 26.2 percent of its energy from renewable sources, more than the year before when it was 25.2 percent. Though it is still not enough to meet their target for 2030, which is 42.5 percent. But it is still something that might affect Russia more in the coming future. When it comes to electricity, things are much better for Europe. Renewable sources provided 49.9 percent of the EU's electricity in 2025. A 2.4 percentage points rise from the year before when it was 47.5 percent. And a substantial increase from just 15.9 percent in 2004.

Conclusion: What Remains to Be Seen

Evidence given by the Union itself, suggests Europe's departure from Russian energy is real but less complete than their political rhetoric. Deadlines are important, but the fact that imports went up instead of down in early 2026 proves that set future bans encourage people to send as much as possible before the rules take effect. Which keeps Russian money coming in as long as the contracts are still valid. The lack of balance between oil and gas is also telling that gas has firm deadlines but oil does not. This is because Commission withdrew its proposed ban after middle east erupted. As said by the president of the European Council, Antonio Costa, “National divergence compounds the problem”.

Dependence of Hungary and Slovakia, on TurkStream lines shows that EU wide laws cannot erase fundamental infrastructure realities. Europe to hit its 2030 target, must double its annual pace of the past decade. 2026 have already shown strain. 2027 will be the real test of whether this is genuine structural change, or simply a more tightly scheduled version of Europe's gradual drift since 2022.

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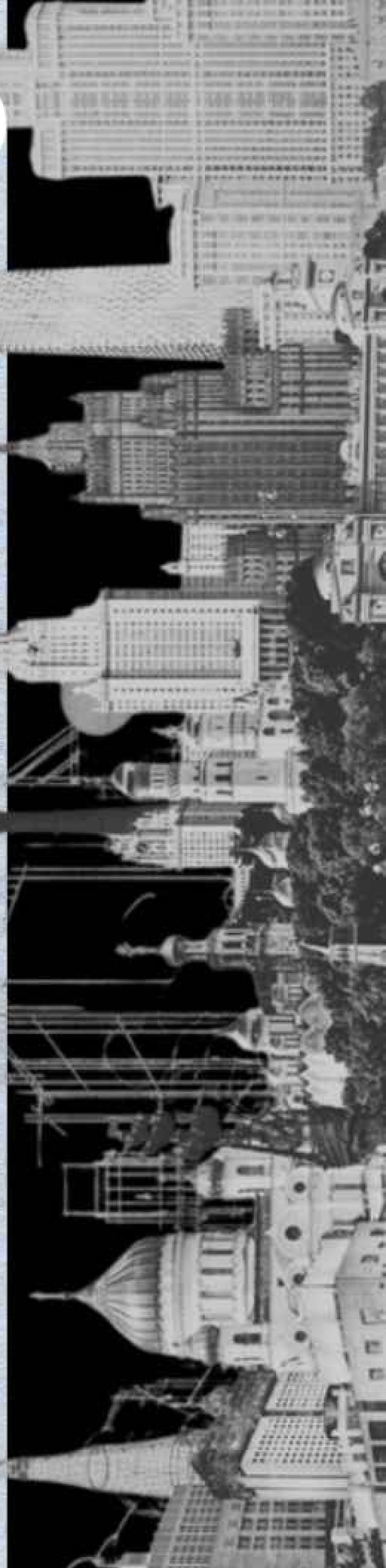

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